



Electronic Document Access 1 (EDA)

EDA **EDM/EFR Documents and**



“Fly-in” Action
(Continue to Page Down/Click on each page...)



EDM/EFR Documents within² EDA

Electronic Document Management (EDM) facilitates the consolidation of DoD finance and accounting functions for DFAS. The Electronic File Room (EFR) system was established to provide electronic foldering, distribution, cataloging, and maintenance of the large amounts and diverse types of Contract and Vendor payment related documentation to the DoD community.

EFR is a web-based application that provides authorized DoD users view only access to DFAS EDM documents. DFAS EDM documents include all the EDM vendor and contract pay related documents.



EDM/EFR and User Authorization

EFR utilizes EDA's delegated *User Authorization* structure and process. This allows the EB POCs to determine if their users require access to Contract Pay and/or Vendor Pay EDM documents. The EB POC follows normal EDA access policies and C/S/A guidelines when granting EDM/EFR document access. The same guidelines for granting access to EDA contracts should be followed for access to EDM documents.

Contract Pay and/or Vendor Pay may be requested within EDA. Upon EB POC approval and EDM/EFR credential set-up, EDA presents a link to **EDM/EFR Documents** on the Document Selection Screen.



EDM/EFR Access Process

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The user requires a separate username/password to access EFR since EDM/EFR is a separate system and access credentials are not integrated with EDA.

An additional user account set-up is required for each user requesting EDM Contract Pay and/or Vendor Pay Documents which is performed by the EDM/EFR Help Desk.

***Let's Take a Closer look at the
Steps and
see what happens...***



Step 1- EDM Access Process⁵

Step 1: EB POC Approves the EDA registration requesting EDM/EFR Documents (Contract Pay and/or Vendor Pay) or modifies an existing account indicating the new Contract Pay and/or Vendor Pay roles.

EDA performs the following upon approval:

- *Creates* an EDA user account without the EDM Document Access. The User can access EDA and view other requested document types available within EDA.
- *Creates* an EDM request within Account Administration.
- *Sends* an e-mail notification to trigger the EDM/EFR Help Desk to establish EFR username(s)/password(s) for the requestor and processes the request within EDA.

**Step
2...**



EDM/EFR Access Process ⁶

Step 2: The EDM/EFR Help Desk services the EDA generated EDM request.

EDM/EFR performs the following functions:

- *Evaluates* the request according to its business rules and creates the necessary EFR account(s) for access into EFR on EB POC approved users.
- *Contacts* the user and *distributes* the EFR username(s)/password(s) access credentials.

**Step
3...**



EDM/EFR Access Process

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Step 3: EDM/EFR Help Desk logs into EDA, accesses the Account Administration functions and processes (approves or deletes) the EDM/EFR requests.

EDA performs the following functions:

- Upon approval, *updates* the EDA User Account to include the Contract Pay and/or Vendor Pay role
- *Deletes* the EDM access request from queue



EDM/EFR Access Process

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EDA users with the EDM Contract Pay and/or Vendor Pay role will be presented with the EDM/EFR Document link on EDA's Document Selection Screen which *redirects* the user to the EDM/EFR system. The link takes the user to the front page of the EFR system where the user is prompted for EFR credentials (separate Username/Password).

EFR is not part of EDA, it is a DFAS owned and operated system. All issues with EFR access should be redirected to the EDM/EFR Help Desk at cco.edm-helpdesk@dfas.mil.

Another way to look at the process...



EDM/EFR Access Process

NEW USER Process...

1. **User** Registers in EDA and enters: Contract Pay & Site information and/or Vendor

Pay & Site info



2. **EDA** Notifies assigned EB POC of Registration Activity by e-mail which includes process

in @ is



3. **EB POC** Opens e-mail
 - Contacts User
 - Verifies Request
 - Validates Access



*Identity check
&
Need to Know??*



Log on

**Enter
EDA**

Perform
Account
Administration
to process
Registration

4.

EB POC Approval Process

THE Approval Process...

1. *New* **EB POC Approves** registration. EB POC must answer 'auditor' question for EDM/EDA access



Log on

2.

- EDA** *New*
- Builds EDM/EFR Request record
 - Sends notification to EDM/EFR Help Desk
 - Adds User to EDA & allows EDA access
 - Audits access & test activities



New

Enter EDA

Perform Account Administration to process EDM/EFR Access Request

New

4.

EDM/EFR Help Desk

Opens e-mail

- **Contacts User/EB POC**
- **Verify Request**
- **Validate Access**



New

3

EDM/EFR Set-up Process

THE Approval of EDM/EFR...

1. **EDM/EFR Help Desk**
Approves/Deletes Contract Pay or Vendor Pay Access requests in EDA.



EDA

2.
 - *Audits* EDM/EFR access
 - *If Approved - Grants* roles to User (user sees EDM/EFR Document link on document selection)

EDM/EFR Help Desk

3.
 - **Distributes EDM/EFR Username/Password**
 - **Assists User as required**



4. **EDM/EFR Documents link**
EDA Redirects to EDM/EFR Web Page

User Logs into EDM/EFR

With EDM/EFR Username/Password



User Logs into EDA
with EDA Username/Password

User Clicks

EDM/EFR Documents link
EDA Redirects to EDM/EFR Web Page



Modify Existing User Access¹²

To Modify an existing User...

1. **EB POC** *Initiates* change to user Account. EB POC must answer 'auditor' question for

access

EDA

2.
 - Builds EDM/EFR Request record
 - Sends notification to EDM/EFR Help Desk
 - Adds User to EDA & allows access
 - Audits access activities



EDM/EFR Help Desk

opens e-mail

3.
 - **Contacts User/EB POC**
 - **Verify Request**
 - **Validate Access**



Log on

**Enter
EDA**

Perform Account Administration to process EDM/EFR

Access Request

4.



Roles & Access Control

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A new EDM/EFR Help Desk role with responsibilities has been established within EDA to administer EDM/EFR access requests

❖ **Access is restricted to EDM/EFR Request queue only**

- Reserved for personnel of the EDM/EFR Help Desk.
- Access to service requests from ALL C/S/A communities

❖ **Responsibilities include:**

- Requires DD Form 2875 to be submitted to EDA Help Desk in Order
- Servicing EDM Requests within EDA for all communities in a timely manner (2-4 business days). EDA's EB POC's approval process generates EDM Requests.
- Establishing EFR username(s)/password(s) access credentials and distributes to users.
- Communicates with EB POCs as necessary if changes to EFR access status.
- Responsiveness to the user community - password resets/access
- Communicates to the EDA Help Desk/Program Office of issues/problems/availability of the EFR system

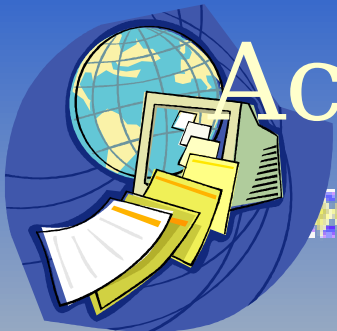


EB POC Authorizes & Requests¹⁴

To Generate EDM/EFR Requests...

- ❖ Log into EDA
- ❖ Click Account Administration

Let's Take a Closer LOOK...



Account Administration Menu¹⁵

EDM Document Access can be requested
by the User through User Registration
or
by the EB POC through Account Administration

Document Selection > A

Refresh

Registrations

Pending (9) Approved / Waiting

Registrations
Click **Pending**

Requests

Password Resets (0) Approved / Waiting User Logon (0)

Government Agent Access (0)

Accounts

Search, View, Modify, Delete

Let's Take a Look at Processing a Registration ...



Processing a Registration

Pending Government/Agent Registrations - DCAA

[Document Selection](#) > [Account Admin](#) > Pending Government/Agent Registrations - DCAA

Total Registrations: 3

<u>Name</u>	<u>Status</u>	<u>Submitted</u>	<u>CSA</u>	<u>Telephone</u>	<u>E-Mail</u>	
Ford, Logan	suspended	Apr 27, 2004	DCAA	888 999 8888	Carol.Flaherty@eds.com	Delete
Ford, Mary	pending	Apr 27, 2004	02701 - Bay States Branch Office	888 999 8888	Carol.Flaherty@eds.com	Delete
Jones, Steve	pending	Mar 31, 2004	Region 2	146171371	steven.p.jones@eds.com	Delete

Click
Name"

**Approve Registration Requesting EDM
Access...**

Approve Registration



Click
Submit

Take Action:

Registration Information [View History](#)

Username: CJFADMIN

Password: *****

Common Name: N/A

First Name: Colleen

Last Name: Collins

Type: Government User

Telephone: 888-999-1212 Ext:

DSN:

E-Mail: carol.flaherty@eds.com

POC Name: William White

POC Telephone: 888-999-0000 Ext:

POC DSN:

POC E-Mail:

C/S/A: DFAS

Documents:

☐ Contracts

☐ All Vouchers

☒ Vouchers - Accounting

☒ Vouchers - Travel

☒ Vouchers - Military Pay

☒ Vouchers - Commercial Pay

EDM Documents - View Only

☐ Contract Pay Documents

Sites requested:

☐ Vendor Pay Documents

Sites requested:

Special None

Roles:

☐ DD1716s

☐ Government Transportation Requests (GTRs)

☐ Freight GBLs

☐ Personal Property GBLs

☐ Non-Automated GBLs

☐ Electronic 110s

☐ Signature Cards

Select **Action** - Approve Registration

Identity

Contact

Point of Contact
(POC)

Organization

Permissions

Verify **CONTACT** information

Summary View of
Registration Information

Approve Account page is
displayed...

Verify/Validate Account

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Status: Active

*Username: CJFADMIN

*Password: N/A

Certificate: N/A

*First Name: Colleen

*Last Name: Collins

*Type: Government Employee

*Telephone: 888-999-1212 Ext. DSN E-mail: carol.flaherty@eds.com

*POC Name: William White

*POC Telephone: 888-999-0000 Ext. POC DSN POC E-mail

Select a CSA: Special Operations Command (USSOCOM)

Name Telephone Ext. DSN Email

Primary: Terry Brodenick2 80808 jacqueline.white@eds.com

Secondary: Terry Brodenick2 80808 jacqueline.white@eds.com

Contracts: ☐ DD1716s ☐ Government Transportation Requests (GTR) ☐ Freight GBLs ☐ Personal Property GBLs ☐ Non-Automated GBLs ☐ Electronic 110s ☐ Signature Cards

☐ Universal Voucher Access ☒ Accounting Vouchers ☒ Travel Vouchers ☒ Military Pay Vouchers ☒ Commercial Pay Vouchers ☒ EDM - Contract Pay Documents ☒ EDM - Vendor Pay Documents

Auditor? ☐ Yes ☒ No

Special Roles: ☐ User Administrator ☐ Contract Attachment Upload ☐ Executive ☐ Contract Load Notification ☐ EB POC ☐ EDM Help Desk ☐ Audit Reports

DODAACs: More DODAACs...

Add This Account Cancel

VERIFY INFORMATION

Make any necessary changes by entering new content into fields.

Ensure e-mail and telephone are correct and current.

Roles & Document Access

Alter (check/uncheck) as required (based on "Need to Know")

Definition: *Need-to-Know* - The principle by which users are only granted access to the information, assets, and resources necessary to perform their assigned job functions.

Requires - Auditor = "Yes" or "No"

EDA generates an EDM access request for service by the EDM Help Desk.

EB POCs authorize and approve access for their user community.

EDM Documents

- Contract Pay
- Vendor Pay

Approve Account

Status: Active		Identity	
*Username CJFADMIN			
*Password N/A			
Certificate N/A			
*First Name	Colleen		
*Last Name	Collins		
*Type	Government Employee		
*Telephone	888-999-1212	Ext.	
DSN			
*E-mail	carol.flaherty@eds.com		
*POC Name	William White		Point of Contact (POC)
*POC Telephone	888-999-0000	Ext.	
POC DSN			
POC E-mail			
*C/S/A	Select a CSA	Organization	
US Special Operations Command (USSOCOM)			
EB POC	Name	Telephone Ext.	DSN Email
	Primary Terry Broderick2	80808	jacqueline.white@eds.com
	Secondary Terry Broderick2	80808	jacqueline.white@eds.com
Documents	☐ Contracts ☐ DD1716s ☐ Government Transportation Requests (GTR) ☐ Universal Voucher Access ☒ Accounting Vouchers ☒ Travel Vouchers ☒ Military Pay Vouchers ☒ Commercial Pay Vouchers ☒ EDM - Contract Pay Documents ☒ EDM - Vendor Pay Documents Auditor? ☐ Yes ☒ No		Permissions
Special Roles	☐ User Administrator ☐ Executive ☐ EB POC ☐ EDM Help Desk ☐ Audit Reports		☐ Freight GBLs ☐ Personal Property GBLs ☐ Non-Automated GBLs ☐ Electronic 110s ☐ Signature Cards ☐ Contract Attachment Upload ☐ Contract Load Notification DODAACs More DODAACs...

Identity Sele

Error Messages are displayed if problems with data.

“*” fields are REQUIRED

“*” fields are
REQUIRED

EDA automatically notifies user of approval

Click **"Add This Account"** approval

approval



Account Maintenance

Document Selection > Account Admin

Refresh

Registrations

Pending (9) Approved / Waiting User Logon (0)

Requests

Password Resets (0) Approved / Waiting User Logon (0)

Government Agent Access (0)

Accounts

Search, View, Modify, Del

Accounts

Click **Search, View, Modify or Del**

Requesting EDM Access from Account Administration...

Modify an Account

Request EDM/EFR Document Access

Contract Pay related documents
and/or
Vendor Pay related documents.

EB POC **authorizes** user and
initiates the access request to
EDM/EFR.

EDM Document access
Generate an EDM Access
Request

Document Selection> Account Admin> Query

Update This Account Reset Cancel

(*required)

Status	Registered	Last Access	Last Modified	View History	Status
Active	03-MAR-2004	03-MAR-2004	03-MAR-2004		

Username DISA1 Identity

Password *****

Certificate N/A

*First Name TopReg

*Last Name Disa1

*Type Government Employee

*Telephone 703-742-2000 Ext. 123 Contact

DSN

*E-mail terri.wharf@eds.com

*POC Name carol flaherty Point of Contact (POC)

*POC Telephone 703-742-2000 Ext.

POC DSN

POC E-mail

*C/S/A Select a CSA Organization

DISA

EB POC	Name	Telephone Ext.	DSN	Email
Primary	disa disaexec	888888		terry.broderick@eds.com
Secondary	Help Desk			

Documents

☐ Contracts	☐ DD1716s
☐ Accounting Vouchers	☐ Government Transportation Requests (GTR)
☐ Travel Vouchers	☐ Freight GBLs
☐ Military Pay Vouchers	☐ Personal Property GBLs
☐ Commercial Pay Vouchers	☐ Non-Automated GBLs
☐ EDM - Contract Pay Documents	☐ Electronic 110s
☐ EDM - Vendor Pay Documents	☐ Signature Cards

[Request Access to EDM Document types](#)

Special Roles

☐ Audit Reports	☐ Contract Attachment Upload
☐ Contract Load Notification	

DODAACs More DODAACs...

Update This Account Reset Cancel



Modify for EDM Access

Modify User Account for EDM/EFR Document Access

EDM/EFR is a separate system.

A New EFR username/password is required...THEREFORE, A mechanism to generate an EDM access request is available. Request triggers the EDM/EFR Help Desk to process and distribute new access credentials.

You cannot simply "Check" Contract Pay and/or Vendor Pay roles.

SET-UP in EFR is required prior to accessing Contract Pay and/or

Documents	
☒ Contracts	☐ DD1716s
	☐ Government Transportation Requests (GTR)
☐ Universal Voucher Access	☐ Freight GBLs
☒ Accounting Vouchers	☐ Personal Property GBLs
☒ Travel Vouchers	☐ Non-Automated GBLs
☒ Military Pay Vouchers	☐ Electronic 110s
☐ Commercial Pay Vouchers	☐ Signature Cards
☐ EDM - Contract Pay Documents	
☐ EDM - Vendor Pay Documents	
Request Access to EDM Document types	

EDM/EFR Help Desk services these additional requests and finalizes the role within EDA. Processing the request 'toggles' the role on in EDA.

Request/View EDM Access

The EDM Role display on the Modify Screen will vary based on current options and in-progress status of requests

You cannot "Check" the role(s)

Permissions	
☐ Contracts	☐ DD1716s
☐ Accounting Vouchers	☐ Government Transportation Requests (GTR)
☐ Travel Vouchers	☐ Freight GBLs
☐ Military Pay Vouchers	☐ Personal Property GBLs
☐ Commercial Pay Vouchers	☐ Non-Automated GBLs
☐ EDM - Contract Pay Documents	☐ Electronic 110s
☐ EDM - Vendor Pay Documents	☐ Signature Cards

[Request Access to EDM Document types](#)

Click "Request Access to EDM Document types"

☐ EDM - Contract Pay
EDM Vendor Pay request Pending
[Request Access to EDM Document types](#)

**Vendor Pay
Pending**

EDM - Contract Pay access request pending
☐ EDM - Vendor Pay
[Request Access to EDM Document types](#)

**Contract Pay
Pending**

EDM - Contract Pay request pending
EDM Vendor Pay request pending

**Both roles Pending
No request capability
Only one request per**

☐ EDM Contract Pay
☒ EDM - Vendor Pay
[Request Access to EDM Document types](#)

**Vendor Pay Role
Request Contract**

☒ EDM - Contract Pay
EDM Vendor Pay request pending

**Contract Pay Role
Vendor Pay**

☒ EDM - Contract Pay
☒ EDM - Vendor Pay

**Vendor Pay Role
Contract Pay Role
No Request**

Pay

Pending

capability



Generate Request for EDM Access

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 **Generate EDM Access Request**

[Document Selection](#) > [Account Admin](#) > Generate EDM Access Request

This screen is used to request access to documents stored on the Electronic Document Management (EDM) Electronic File Room (EFR) system.

- Requests for access to the EFR system are subject to approval by the EDM help desk.
- You MUST indicate whether or not the user is an auditor.

Select the EDM document types you want Carol Flaherty to access:

☐ Contract Pay Documents
List desired Contract Pay sites (for example: North, West, South)

☐ Vendor Pay Documents
List desired Vendor Pay sites (for example: Columbus, Omaha, Charleston)

Is this user an Auditor? ☐ Yes ☐ No

Click
**Vendor
Pay
AND/OR
Contract
Pay**

**Enter Site
Information**
**Enter Site
Information**

Click
"Submit"

EDA sends notification to the EDM/EFR Help Desk and builds the EDM Access Request for action by the EDM/EFR Help Desk

EDM/EFR Help Desk services these additional requests and finalizes the role within EDA. Site information is used by them in establishing access into EFR

After EFR Set-up, User Sees



EDM/EFR processes the EDM access request within EDA. After approval EDA updates the User Account and indicates Contract Pay and/or Vendor Pay roles.



Dep
Electr
Docume

User's having either *Contract Pay* or *Vendor Pay* roles are presented the EDM/EFR Documents link on the EDA Document

Account Administration
My Profile....
EDM/EFR Documents

The EDM/EFR Document link REDIRECTS the user to the front page of the EFR system where the user will be prompted for their EFR

access credentials



EDA User's Guide

Refer to the EDA Users Guide

- STEP-by-STEP Instructions (for all Users)
- Training Modules
 - More detail on EDM/EFR role & responsibilities

The End